

**CITY OF NEWTON
PURCHASING DEPARTMENT**

CONTRACT FOR NEWTON PUBLIC SCHOOLS

**PROJECT MANUAL:
STUDENT INFORMATION SYSTEM (SIS)
FOR NEWTON PUBLIC SCHOOLS
*REQUEST FOR PROPOSAL #17-95***

Bid Opening Date: May 4, 2017 at 10:00 a.m.

APRIL 2017

Setti D. Warren, Mayor

NEWTON PUBLIC SCHOOLS

Student Information System (SIS) for Newton Public Schools

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**CITY OF NEWTON
PURCHASING DEPARTMENT
REQUEST FOR PROPOSALS #17-95**

This City of Newton Request For Proposals (RFP) invites sealed proposals from Contractors for

STUDENT INFORMATION SYSTEM (SIS) FOR NEWTON PUBLIC SCHOOLS

Proposals will be received until **10:00 a.m., Thursday, May 4, 2017** at the Purchasing Department, Room 201, Newton City Hall, 1000 Commonwealth Ave., Newton, MA 02459. Immediately following the deadline for proposals a list will be created of all proposers names received and will be posted to the City's website: www.newtonma.gov/bids.

Documents associated with this RFP (Contract Documents) will be available online at the City's website: www.newtonma.gov/bids after: **10:00 a.m., April 13, 2017.**

Proposers are responsible for downloading proposal specifications from the City of Newton's website at www.newtonma.gov/bids. Proposers are requested to email the City of Newton Purchasing Department (purchasing@newtonma.gov) with their Company Name, Address, Email address, Phone & Facsimile number and bid # (i.e. #17-95).

The term of the awarded three (3) year contract **shall extend from the day of execution through June 30, 2020.**

It is anticipated that contract will be awarded on July 1, 2017. The awarded Contractor will be transitioning from the current Contractor, Skyward, Inc. ("Current Contractor"). For the period between July 1, 2017 and December 31, 2017, the awarded Contractor will develop software meeting the specifications of this RFP. For the period between January 1, 2018 and June 30, 2018, the awarded Contractor will test its system in conjunction with the Current Contractor, whose contract will end on June 30, 2018, at which time the awarded Contractor will be the sole provider of SIS services.

As this is an RFP, proposers shall submit (i) a technical, or non-price proposal, which includes everything responsive to this RFP except the proposed contract price, and (ii) a price proposal. There is no specific form for the technical proposal, although it should be responsive to all information requested in the RFP. The price proposals shall be submitted on the Price Proposal #17-95 form included in this RFP.

All proposals submitted should include (i) for the technical proposal, ONE (1) ORIGINAL and FIVE (5) COPIES; and (ii) for the price proposal, ONE (1) ORIGINAL. In addition, a digital copy of the technical proposal is requested to be provided on a CD or USB stick.

Proposers' attention is directed to the requirements of the City's Supplemental Equal Employment Opportunity, Anti-Discrimination and Affirmative Action Program and to the Minority/Women Owned Business Enterprise Plan from December 1999, all of which are available on the City of Newton Purchasing Department's web page. In the event of conflict between any of the above listed policies, the stricter policy shall apply.

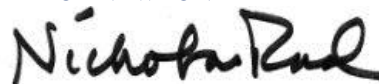
All City of Newton bids are available on the City's web site, www.newtonma.gov/bids. It is the sole responsibility of the contractor downloading these bids to ensure they have received any and all addenda prior to the bid opening. Addenda will be available online within the original bid document as well as a separate file.

If you download bids from the internet site and would like to make it known that your company has done so, you are requested to email the Purchasing Department (purchasing@newtonma.gov) with the Company Name, Address, Email address, Phone & Facsimile number and what bid # (i.e. #17-95) has been downloaded.

The City will reject any and all proposals in accordance with the above referenced General Laws. In addition, the City reserves the right to waive minor informalities in any or all bids, or to reject any or all proposals (in whole or in part) if it be in the public interest to do so.

In the event that any person wishes to attend a bid opening or pre-bid meeting, accessible and reasonable accommodations will be provided to persons requiring assistance. If you need a reasonable accommodation, please contact the city of Newton's ADA Coordinator, Jini Fairley, at least two business days in advance of the meeting: jfairley@newtonma.gov or (617) 796-1253. For Telecommunications Relay Service, please dial 711.

CITY OF NEWTON



Nicholas Read
Chief Procurement Officer
April 13, 2017

**CITY OF NEWTON, MASSACHUSETTS
PURCHASING DEPARTMENT**

April 13, 2017

REQUEST FOR PROPOSAL No. #17-95

STUDENT INFORMATION SYSTEM (SIS) FOR NEWTON PUBLIC SCHOOLS

I. DECISION TO USE COMPETITIVE SEALED PROPOSALS

The Chief Procurement Officer has determined that, in order to select the most advantageous proposal for the delivery, implementation, management and support of a SIS system for the Newton Public School system (NPS), extensive experience in the end-user experience, development, management, Massachusetts state reporting and on-going support of student data information systems in a large public school system; a detailed plan of services to support such a system and recommendations and an implementation plan to create and operate the system. The RFP process will allow the City to assign comparative ratings to Proposers based on the extent of their experience providing similar services to comparable school districts within the Massachusetts. Further, the RFP selection process will enable the City to select a Proposer that has demonstrated capability in utilizing pilots, demonstrations and other means to test ideas and educate NPS on potential solutions.

The Newton School Committee will assign an Evaluation Committee to evaluate each proposal. After review of the technical proposals, the Evaluation Committee will schedule interviews with all Proposers who have been deemed responsive and responsible with reference checks to follow. The Proposer identified as most advantageous will be expected to develop and present a management plan in accordance with the proposal requirements as further described herein, no later than thirty (30) days upon notification of award.

II. INSTRUCTIONS TO THE PROPOSER AND TECHNICAL PROPOSAL

- A. **GOVERNING LAW and DEADLINE FOR SUBMISSION:** All proposals must be submitted in accordance with Massachusetts General Laws Chapter 30B, Section 6, to the *Chief Procurement Officer* in the Purchasing Department, Newton City Hall, 1000 Commonwealth Avenue, Room 201 Newton, MA 02459, no later than **10:00 a.m., May 4, 2017.**

Proposers shall provide (i) for the TECHNICAL PROPOSAL, **ONE (1) ORIGINAL and FIVE (5) COPIES and ONE (1) CD or ONE (1) USB Memory Stick** and (ii) for the PRICE PROPOSAL (Attachment A), **ONE (1) COPY.**

Proposals shall be submitted in two (2) sealed envelopes. Envelopes shall be marked:

1. **“TECHNICAL PROPOSAL – RFP #17-95 STUDENT INFORMATION SYSTEM”**

Technical proposals must have information submitted in the same order as the criteria listed in this RFP and pages shall be numbered in the bottom footer. Proposals must have a Table of Contents that lists the page number providing documentation that demonstrates they have met each of the criteria listed.

2. **“PRICE PROPOSAL – RFP #17-95 STUDENT INFORMATION SYSTEM”**

IF PRICE IS INCLUDED IN THE TECHNICAL PROPOSAL, THE PROPOSAL MAY BE DISQUALIFIED.

Faxed or emailed proposals will not be accepted.

The Price Proposal shall consist of two (2) alternate price submissions, one for an SIS system maintained by NPS (“Locally Hosted Price”), and one for a system hosted by the Proposer (“Proposer Hosted Price”). The City shall select the alternate that is in the best interests of the City at the time the Price Proposals are opened. (*See Attachment A-Price Proposal, below.*)

The City of Newton’s Purchasing Department converted to an email notification system of all upcoming public bids, effective July 1, 2009. If you wish to receive notification of bids, please email us with your company information to purchasing@newtonma.gov, otherwise you may view all City of Newton public bids online at www.newtonma.gov/bids.

- B. QUESTIONS/ADDENDUMS: Inquiries involving procedural or technical matters should be directed in writing, no later than Friday, April 28, 2017 at 12:00 noon to:

purchasing@newtonma.gov or facsimile (617) 796-1227

Purchasing Department
City of Newton
1000 Commonwealth Avenue
Newton, MA 02459

ADDENDA: Each proposer is required to acknowledge any/all Addenda. Proposers shall place their acknowledgment as the first line of their Transmittal/Cover Page, which shall be placed as the first page of the “Technical Proposal” as well as in the designated line of the “Price Proposal”.

Addenda will be posted online and emailed to every individual or firm on record as having received a set of Contract Documents. If you have downloaded the RFP from the internet, you must make your company known to the City of Newton, Purchasing Department by emailing or faxing your company’s: name, address, phone, fax, and email address and include the RFP NUMBER (#17-95) and project title. It is the contractor’s sole responsibility to ensure that they have received all addenda prior to the RFP submittal date. Copies of addenda will be made available at the Purchasing Department and on the City’s website: www.newtonma.gov/bids

- C. EXAMINATION OF DOCUMENTS: Each Proposer shall be satisfied, by personal examination of the location of the contemplated services and by any other means, as to the requirements of the contemplated services to enable the intelligent preparation of this proposal. The Proposer shall be familiar with the Contract Documents before submitting the proposals in order that no misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance will be made for any claim that the proposal is based on incomplete information as to the nature and character of the area or contemplated service.
- D. The City of Newton will reject any and all proposals when required to do so by the above referenced General Laws. In addition, the City of Newton reserves the right to waive any informalities in any or all proposals, or to reject any or all proposals, in whole or in part, if it be in the public interest to do so.

E. TIMELINE:

Event	Date
Release of RFP and post to City website.	April 13, 2017
Final questions to be submitted in writing no later than	12:00 p.m., April 28, 2017. Email: purchasing@newtonma.gov
Answers to all questions in addendum issued on	May 2, 2017
Proposals Due	May 4, 2017 at 10:00 a.m.
Interview responsive Proposers and User site visits	May 15 - 31, 2017*
Proposal Evaluations Completed	June 16, 2017*
Contract Award Date	June 30, 2017*
SIS Implementation Services Start Date	July 10, 2017
SIS Training	November/December 2017
SIS Go-live date no later	January, 2018

*These dates are estimates

- F. Each Technical Proposal (**not to exceed 100 pages excluding attachments such as company financial reports, System User/Administration manuals, SIF State certifications, etc.**) must contain a section for each of the following:
1. A transmittal sheet including acknowledgment of any Addendum for this RFP.
 2. A Letter of Interest including a brief history of your company and company’s experience developing and supporting SIS systems.
 3. Company History.

4. An organizational chart indicating names, positions and current resumes of the key personnel related to this project; summaries of credentials and the number of years of experience developing and managing SIS services for public school districts for the Proposer's Project Manager and the Implementation Team who will work with NPS on this contract. Note that the contract will require the same Project Manager be assigned to this contract for the first year. Any changes to the Project Manager need to be pre-approved, in writing, by the NPS's IT Director. A full team is to be assembled to provide these services to meet the requirements within this RFP.
5. Resumes of key personnel.
6. Copies of your audited financial statements or tax returns signed by the preparer demonstrating the company's profitability for the three (3) previous fiscal years.
7. Minimum Criteria
8. Evaluation Criteria
9. A list of current and former public school districts within the northeast for which the Proposer has provided SIS services as described in this RFP during the past five years. Please indicate current or former customer on the list provided.
10. Provide a list of up to five (5) school districts (nationwide), if any, that the Proposer has converted from the Current Contractor.
11. Attachments A, B, C, D (if applicable) & E
12. References: Provide a minimum of five references from public school systems that the Proposer has successfully implemented and converted from an existing SIS to a new SIS. References will be verified by NPS.
 - a. Provide a minimum of one reference from a district that most closely matches NPS in size and need: a public school district with a minimum of ten (10) schools or a minimum population of 7,000 attending students.
 - b. Provide a minimum of one reference from a district that uses a rotating block schedule where blocks rotate each day based on rotation and meeting patterns (i.e. Day 1 Courses 1 through 5, Day 2: Courses 3 through 7, Day 3: Courses 5,6,7,1, and 2).
 - c. Provide a minimum of one reference from a district that uses the master schedule builder to generate a new schedule (schedule class, teacher, block, room) versus rolling a school schedule from the previous year.
 - d. Provide a minimum of one reference from a district that uses the family portal for new student registration and contact updates.
 - e. Provide a minimum of one reference that can attest as to the Proposer's training methodologies.
 - f. Provide a minimum of one reference from a district that has utilized the customization and reporting tools within the SIS including creative customizations and advanced custom reports.
 - g. Provide a minimum of one reference, if applicable of a district that the SIS Proposer has converted from the Current Contractor.
 - h. Provide a minimum of one reference, if applicable from a district that uses the Special Education Module (IEP, 504)
 - i. Provide a minimum of one reference from a Massachusetts district which uses SIS to complete SIMS, SCS and EPIMS to state reporting through SIF.
 - j. References submitted should include a one paragraph synopsis, dates of service (purchase and implementation), school district addresses, email addresses and telephone numbers of district contacts, as well as prior SIS systems from which the referenced district has converted.
 - k. If the SIS Proposer has had a contract terminated for default during the past five (5) years, all such actions must be described. "Termination for default" is defined as notice to stop performance due to the SIS Proposer's non-performance or unacceptable performance. Describe all previous terminations for default that have occurred during the past five (5) years, including the other party's names, addresses and telephone numbers. Present the companies' position on the matter. Please indicate if your company has experienced no such termination for default in the past five (5) years.
 - l. If the SIS Proposer has had a contract with a district and or school within Massachusetts that has ended and was not renewed for any reason such as: a contract terminated for convenience, non-allocation of funds, or any other reason, during the past five (5) years, the proposer should describe fully all such endings, non-renewals, terminations, including the name, address and telephone number of the former client.

Jointly, two members of the Evaluation Committee will complete a reference check of all Proposers interviewed. Consistent and uniform questions will be asked of each reference. Committee members jointly checking references will prepare a report for the Evaluation Committee.

12. Proposer shall provide a five (5) year strategic roadmap of Proposer's SIS priorities and product development including related product offerings. Proposer should specifically outline any end-of life replacements or major changes, if any, that are planned.
13. Proposer shall provide both a detailed and a high-level overview of the SIS proposal, including a narrative explanation of SIS features, specifying SIS core product offerings and features that require additional cost. Attachment E contains detailed requirements with general and specific, functional and technical requirements based on end-user needs that NPS has identified which will help guide you in responding to the following questions.
 - a. Provide a detailed description relating to Navigation & Messaging.
 - b. Provide a detailed description relating to Attendance.
 - c. Provide a detailed description relating to Reporting.
 - d. Provide a detailed description relating to Gradebook including secondary and standards-based. Standards based Gradebook to be used to generate elementary progress reports.
 - e. Provide a detailed description relating to Enrollment.
 - f. Provide a detailed description relating to the Walk-in and Master Scheduling. Specifically, but not limited to supporting rotating block schedule where blocks rotate each day based on rotation and meeting patterns (i.e. Day 1 Courses 1 through 5, Day 2: Courses 3 through 7, Day 3: Courses 5,6,7,1, and 2).
 - g. Provide a detailed description relating to the family and student portal. Specifically, but not limited to, ability to post multiple and historical report cards, schedules, and custom reports. Collect information from families through customized forms, such as new student registration, annual permissions and opt-outs.
 - h. Provide a detailed description relating to the grading setup, including GPAs. Specifically, but not limited to, support of classes running on quarters, while graded on trimesters. Ability to calculate and track both weighted and un-weighted GPAs.
 - i. Provide a detailed description relating to Special Education Module (IEP, 504)
 - j. Provide a detailed description of system customizations, reporting, exporting and integration with external systems.
14. Provide a detailed description of how the Proposer will meet the NPS core requirements of state reporting, including SIMS, SCS and EPIMS data collection using SIF. Include Massachusetts districts, and define which method SIF or legacy is used for each SIMS, SCS, EPIMS within those districts. Specify any constraints within the SIS for accurate and timely reporting of SIMS, SCS, and EPIMS. Provide defined process for continued compliance with future commonwealth of Massachusetts reporting requirements and due dates defined by Massachusetts DESE and NPS. The vendor must guarantee that SIS will maintain compliance with all Massachusetts and Federal regulations and reporting requirements for the state defined collection periods without additional cost to District.
15. Provide an implementation plan, which shall include a detailed identification of tasks, timelines and resources as well as details of how SIS Proposer plans to implement the SIS for NPS. The proposed plan should include, but is not limited to, installation, data conversion, customizations, training, state reporting, and ongoing support. This transition plan must outlined in detail from pre-planning July 10, 2017 through go live January 2018. Provide information regarding implementation methodology and the expected roles of both the Proposer and the District throughout the implementation process.
 - a. Proposer will outline its data conversion methodology and the expected roles of both the Proposer and the District as it pertains to data conversion.
 - b. Data will need to be migrated from the Current Contractor (Progress back-end). **Important:** proposer must specify if the proposer will convert the data from Progress database or will require district staff to provide data through import templates, or a combination. Specify method to be used for the data sets below. If proposer requires that the district uses import templates, please provide examples.
 - c. The following data sets will require data migration (example high level data elements provided):
 - i. Include all Demographics & Enrollment (student data, contact data, enrollment data)
 - ii. Include all Attendance Data (summarized data for historical years, detailed class & daily attendance data for current year data)
 - iii. Include all Transcript & Historical grade data (school, course, teacher(s), credits, term and final grades)
 - iv. Include all Current Grade data for K-12 (note that elementary uses standards based grading)
 - v. Include all Current Schedule data (course, class, teacher(s), term, room as well as any additional data necessary to run the schedule and complete state reports)

- vi. Include conversion & customization of the Report Card, Progress Report, Student Schedule Matrix and Transcript Templates.
 - vii. Include conversion of current IEP Information and historical IEP information necessary for state reporting. It is at the district's discretion if Student Services module is chosen.
- b. Proposer will outline district implementation of integration and define the expected roles of the Proposer and the District as it pertains to, but is not limited to, the following systems:
- i. Active Directory/LDAP specific to Student & Staff account provisioning.
 - ii. Google Drive CPSI/SIF specific to Student & Staff account provisioning.
 - iii. PCG EasyIEP
 - iv. Schoology
 - v. PSNI SNAP Health Center
 - vi. Follet Destiny
 - vii. School Messenger
 - viii. ELlevation
 - ix. Teachpoint
 - x. Food service/Lunch Box
- c. Proposer will outline methodology and the expected roles of the Proposer and the District as it pertains to reviewing existing customizations in the Current Contractor and legacy PowerSchool SMS. Outline how these feature areas will be implemented within the Proposer's SIS including data migration and implementation support for:
- i. Program Management and User Fees (Transportation, athletics, activities, student parking, early morning program)
 - ii. Response to Intervention (RTI)
 - iii. Student Opt Outs, Opt Ins, Permissions and AUP.
 - iv. Academic Support Programs (ELL, LLI, RTI, Title 1, Career & Tech, 504)
 - v. Various Student Services Related Information
16. Proposer shall provide a high-level overview of training methodology, including but not limited to: On-site training, Web training, ongoing training options available post implementation at no additional cost, and any additional recommended training that may be purchased. Provide a complete breakdown of the training hours included in your technical proposal. **DO NOT INCLUDE HOURLY RATES IN YOUR TECHNICAL PROPOSAL.** This section should be broken down by module and the location of training (web vs. on-site) and should be delineated for elementary, middle and high school level audience, and include key stakeholders (e.g., elementary administrative assistants, high school schedulers, administrators). Proposer should specify that training days and or hours outlined in the proposal shall not have an expiration date and will be at the discretion of the district as to how they will be utilized. Proposer shall provide sample training agendas and reference materials as part of the proposal. The total number of proposed on-site days and maximum training class size must be included as follows:
- a. Proposer must provide on-site school office administrative assistant training (i.e. demographics, attendance, enrollment, parent portal and administering grading/historical records for secondary level). The training should be provided by school level based on content areas. (25 staff elementary, 25 staff middle, 25 staff high school).
 - b. Proposer must provide on-site scheduler training for elementary, middle school and high school (i.e. master schedule, walk-in scheduler, course, staff record set-up and parent portal). The training should be provided separately for middle school (10 staff) and high school level (10 staff). Elementary schedule training should be provided to district based staff (up to 8 staff).
 - c. Proposer must provide on-site school and district administrator training (behavior management, reporting, advanced searching, exporting, etc.). The training can be combined for secondary school audience (30 staff).
 - d. Proposer must provide on-site guidance counselor training for the secondary level (i.e. walk-in scheduling, browsing records, parent portal) (50 staff).
 - e. Proposer must provide on-site teacher training. NPS will also utilize a "Train the Trainer" model to train instructional personnel (30 staff) (i.e., grading, attendance, student services and parent portal).
 - f. Proposer must provide on-site District IT administrator training to manage system configuration, customization elements and report writing (10 staff).
 - g. Proposer must provide on-site special program enrollment training (i.e. IEP, 504, RTI, Athletics, Assessment Tracking and Transportation). These may be rolled into the above training sessions.

Proposer's proposal should include a plan for follow-up training opportunities for the above roles such as built-in learning modules, webinar sessions and other training methodologies.

17. Provide a detailed description of hardware, software, security, performance and availability with options for both locally hosted and software as a service.
 - a. Proposer shall provide minimum hardware, software, storage, memory, operating system and any other requirements necessary to host and access the SIS application. A detailed breakdown of server requirements and recommendations based on the District's size and any other determining factors in addition to a virtualization environment must be included.
 - b. For district hosted option, Proposer must provide a recommendation for a secondary replicated district hosted site to insure availability and continuity of SIS operations.
 - c. This section should include information regarding the database management system used and query and reporting tools provided or made available as part of the proposal.
 - d. For software as a service hosted option includes information regarding the hosting environment of your solution and any options that your company offers for database administration. Specify if SIS Proposer must specify if they will host the SIS, or use a 3rd party hosting partner. **Important:** Make sure to include how District will retain and access a copy of data locally on a weekly or daily basis.
 - e. Detail security features of your system, including but not limited to: FERPA compliance, application security, physical security of the data center (if Proposer-hosted).
 - f. System performance reliability should be discussed, including, but not limited to, the following items: average report run times, specifically student schedules for a 2000 student high school as well as report cards (for 2000 students) and progress reports (for 500 students) and average times for pages load and problem avoidance techniques.
 - g. Detail specific information regarding backup and recovery strategies to guarantee up-time.
18. Proposer must provide information on its post-implementation support model, including, but not limited to: phone support, web/chat support, expected/guaranteed response time.
 - a. Include details as to the Proposer's post implementation support release schedule, including frequency and importance of updates and options available to the District for downloading, installing and support.
 - b. Provide details on any additional support and or reporting tools or documentation that will be made available to the District at no additional charge above and beyond the proposed Annual License Fee.
 - c. Proposer shall describe its recommended approach to testing, including, but not limited to: system testing, compatibility testing, beta environments / user acceptance and performance testing. This section should address triage procedures that the Proposer has in place to prioritize defects and alerting customers and correcting errors.
19. CORI and SORI checks shall be completed by the SIS Proposer on all employees who are designated to be on-site at any NPS location prior to their starting date as outlined in the Commonwealth of Massachusetts Education Reform Law of 1994. CORI and SORI checks shall also be completed by NPS of the SIS Proposer's employees prior to the start date of the planning and implementation phases.
20. Forms: A signed Certificate of Non-Collusion, as well as a signed Attestation Form (Certificate of Payment of Taxes to the Commonwealth of Massachusetts) and a signed Certificate of Authority. Forms are provided for all of these submissions in attachments A, B, C, D (if applicable) and E as also listed under Minimum Criteria.

III. EVALUATION OF PROPOSALS

There will be no public opening of submitted proposals. Following the deadline for receipt, the *Chief Procurement Officer* will open the Technical Proposals and prepare a register of those firms submitting proposals which shall be available for public inspection. All proposal contents shall be confidential until the evaluation is final.

The Technical Proposals shall be evaluated by an evaluation committee designated by the *Chief Procurement Officer* who shall prepare their evaluation based on the criteria contained herein.

Upon completion of the technical evaluation, the *Chief Procurement Officer* will open and evaluate the Price Proposals. A contract will be awarded to the responsive and responsible proposer whose proposal is determined to be most advantageous taking into consideration cost and evaluative criteria. The City reserves the right to reject any and all proposals if to do so is determined to be in the best interests of the City.

All proposals shall remain firm for sixty (60) calendar days after the proposal opening.

IV. NARRATIVE DESCRIPTION

A. Introduction

Newton, Massachusetts is a city of 89,000 people, located twelve miles west of downtown Boston. NPS has 23 schools organized by Elementary K-5, Middle School 6-8 and High School 9-12 arrangement with a current enrollment of more than 13,000 students for FY17. There are fifteen elementary schools, with an average size of 400 students, four middle schools averaging 725 students and two senior high schools with approximately 2,000 students. In addition, Newton Public Schools has approximately 150 special needs students attending private schools and 250 pre-school students. The school system is governed by a Superintendent as well as a School Committee of eight members elected at-large from the city's eight wards for two year terms. The City Mayor serves as the ninth voting member of the School Committee. The NPS budget for FY18 is \$219 million, accounting for approximately one half of the annual spending for the City of Newton.

B. Purpose

This RFP will enable Newton Public Schools (NPS) to procure a new Student Information System (SIS) as the contract for our existing system, Skyward Inc., will end on June 30, 2018. NPS is seeking a web based SIS with a fully integrated gradebook and family/student portal. Key features include: easy to use navigation, demographics, attendance, scheduling and grading modules. The SIS must demonstrate full-featured reporting and exporting capability and have flexible customization features for all modules. The SIS must include a comprehensive family portal with the ability to publish multiple custom reports and collect information from families through customizable forms, including new student registration and contacts updates. The system must have Massachusetts SIF reporting certification for SIMS, EPIMS and SCS with a proven reporting track record with other Massachusetts school districts. The SIS must have fully featured integration capabilities with other systems such as Schoology LMS and LDAP.

C. Objectives of NPS:

NPS requests that the proposed SIS system integrate with existing programs as identified within this RFP. In addition, the SIS Proposer must be able to meet NPS' timeline for complete installation and projected go-live date in January 2018. The SIS system must meet requirements and objectives set forth in the Evaluation Criteria. The SIS system must be supported for a minimum of ten (10) years subsequent to the award date. [The contract is for 3 years. How can support be provided for 10?] The SIS system must be user friendly providing easy and accurate tracking and in compliance with all Massachusetts required state reporting.

V. MINIMUM CRITERIA

All proposals must have a section in their proposal labeled MINIMUM CRITERIA and must provide all necessary documentation as evidence that they meet each of the following minimum criteria in order to be considered for further evaluation. If you have placed your documentation elsewhere in this Technical Proposal, you shall indicate the page number where that documentation can be found within your Technical Proposal. **If documentation or identification of page number is not clearly evident for each criterion, the proposal may be deemed unresponsive.**

The proposer and/or those employees of the proposer who will be assigned to this project shall provide evidence of the following:

1. SIS Proposer has a minimum of five (5) years of favorable end-user experience, updating, maintaining, installing, training, managing and supporting SIS services that fully satisfied the school, federal and state law needs and requirements within the Commonwealth of Massachusetts.
2. SIS Proposer has a minimum of five (5) years of meeting or exceeding specific timeline targets set by the district within the Commonwealth of Massachusetts. [How is this proved? What "district" do you mean?]
3. SIS Proposer has provided SIS services to a minimum of three (3) public school districts in Massachusetts within the last five (5) years with at least one district consisting of a minimum of ten (10) schools and or a minimum of 7,000 attending students.
4. SIS Proposer maintains current certification as a Massachusetts State SIF for SIMS, EPIMS and SCS. SIF must be currently used by five (5) other Massachusetts school districts for the most recent collection period. Include a copy of your Massachusetts SIF certification and or proof of State SIF reporting compliance in the RFP response.

5. SIS Proposer has included a technical proposal.
6. SIS Proposer demonstrates that the SIS solution has the following core functionality:
 - a. Student Demographics
 - b. Attendance Tracking
 - c. Family and Student Portal
 - d. Rotating Block Schedule
 - e. Secondary Gradebook
 - f. Standards Gradebook (Elementary Progress Reports)
 - g. Custom Forms and Fields
 - h. Report Writer for Custom Reporting
 - i. Integration with external systems such as Schoology, SchoolMessenger, and LDAP Active Directory.
7. SIS solution must be web based, with a relational database system.
8. SIS Proposer has included a five (5) year strategic roadmap of Proposer's SIS priorities and product development including related product offerings. Proposer should specifically outline any end-of life replacements or major changes, if any, that are planned.
9. Proposer's Qualifications and References Form, 2 pages
10. Non-Collusion Form, 1 page
11. Debarment Letter, 1 page
12. IRS W-9 Form, 1 page

VI. EVALUATION COMPARATIVE CRITERIA

Proposals from contractors who meet or exceed the minimum criteria will be evaluated and rated on the basis of the following comparative criteria. The city reserves the right to ask any respondent to provide additional supporting documentation in order to verify its response.

Ratings of Highly Advantageous (HA); Advantageous (A) or Not Advantageous (NA) will be given, applying the following criteria for each respondent. A composite rating will then be determined. A composite rating of Highly Advantageous or Advantageous may be assigned only if a proposal has received at least one such rating from the criteria listed below.

To the extent that an Evaluation Criterion requires the certification of fact, the proposer's certification as to that fact shall be an adequate response provided, however, that on request the proposer shall provide to the City such evidence as the City may request to support that fact.

All proposals must have a section labeled EVALUATION CRITERIA and must provide all necessary documentation as evidence that the proposal meets each of the following criteria. If you have placed your documentation elsewhere in this technical proposal, you shall indicate the page number(s) where that documentation can be found. If documentation or identification of the page number(s) is not clearly evident for each criterion the proposal may be deemed non-responsive. The evaluation of the Technical Proposals will be based on the "evaluation criteria" described in this section. A proposal will receive the appropriate rating based on the foregoing and no consideration shall be given to materials and features not requested by the criterion.

The evaluation of each proposal for a Student Information System will be based upon the "Comparative Evaluation Criteria" described in this section. The following scale will be used to rate each evaluation criterion, as well as to determine a composite rating of each proposal:

"Highly Advantageous"
 "Advantageous"
 "Not Advantageous"

1. **Newton SIS Requirements - Attachment E (Rating weight = 20%)**

The Proposer has demonstrated that its SIS system has the specified functionality as identified in Attachment E: Newton Public Schools SIS Requirements. Each tab focuses on a specific end user including the following: Elementary Teachers, Elementary Administrative Assistants, Secondary Teachers, Secondary Administrative Assistants, Secondary Counselors, Secondary Schedulers, Student Services, Principals/Administrators, Students/Families and Technical. s, District staff and participants will complete a rating to verify Attachment E requirements during presentations, demonstrations and or site visits. A combined total rating will be calculated by designated school district staff. Each requirement in Attachment E will be ranked as follows:

- 2 point: Meets requirement
- 1 point: Partially meets requirement
- 0 Point: does not meet requirement

Highly Advantageous: SIS meets 90-100% of NPS Requirements as specified in Attachment E

Advantageous: SIS meets 80-89% of NPS Requirements as specified in Attachment E

Not Advantageous: SIS meets less than 80% of NPS Requirements as specified in Attachment E

2. **Presentations and Interviews (Rating weight = 5%)**

Proposers will be required to make a presentation and an on-site demonstration of the proposed SIS based on a provided schedule. If additional time is requested the presenters should be prepared to demonstrate additional features and technical capabilities.

Highly Advantageous: SIS Lead Representative and at least one other key team member are present for the presentation. The presentation is logical and organized, outlining and communicating an achievable and comprehensive plan that addresses all aspects of the product and project. During the interview process, the project presenters successfully respond to all questions posed, demonstrating product knowledge, communication skills, and understanding of the district's SIS needs. The presentation content is well articulated and delivered in a way that is understandable for participants with a range of technical abilities from non-technical to highly technical. All project presenters must maintain a high level of professionalism throughout the presentation.

Advantageous: SIS Lead Representative and at least one other key team member are present for the presentation. The presentation is somewhat logical and organized, outlining and communicating an achievable and comprehensive plan that addresses all aspects of the product and project. During the interview process, the project presenters respond to most of the questions posed, demonstrating product knowledge, communication skills, and understanding most of the district's SIS needs. The presentation content is mostly well articulated and delivered in a way that is mostly understandable for participants with a range of technical abilities from non-technical to highly technical. All project presenters must maintain a high level of professionalism throughout the presentation.

Not Advantageous: SIS Lead Representative not present during the presentation. The presentation is lacking in logic and organization, outlining and communicating a somewhat achievable and comprehensive plan that addresses some but not all aspects of the product and project. During the interview process, the project presenters respond to some of the questions posed. The presenters were vague in their demonstration of the product and could not clearly communicate an understanding of the district's SIS needs. All or some project presenters did not maintain a high level of professionalism throughout the presentation.

The Evaluation Committee will schedule an on-site demonstration and presentation. Upon request, the Proposer must deliver a presentation and demonstration within two calendar weeks of notification, or as arranged by the Purchasing Agent.

3. **Experience & Track Record (Rating weight = 10%)**

The Proposer has demonstrated that it can meet Newton Public Schools needs and has demonstrated that they have been responsive and responsible in working with the requests of Massachusetts school districts to enhance the SIS and satisfied the school, federal and state law needs and requirements.

Highly Advantageous: Proposer has a minimum five (5) years of favorable end-user experience, updating, maintaining, installing, training, developing, managing and supporting SIS services. SIS Proposer has managed a minimum of five (5) public school districts in Massachusetts within the last five (5) years with at least one district consisting of a minimum of ten (10) schools and or a minimum of 7,000 attending students. The Proposer has demonstrated that they have worked with and met school district expectations for feature enhancements to the SIS and satisfied the school, federal and state law needs and requirements within the Commonwealth of Massachusetts. Proposer has outlined a five (5) year strategic roadmap for the SIS, including priorities and product development including related product offerings which align with the needs of Newton Public Schools. Proposer has shown that no Massachusetts district has switched from the Proposer's SIS over the last five (5) years.

Advantageous: Proposer has a minimum five (5) years of mostly favorable end-user experience, updating, maintaining, installing, training, developing, managing and supporting SIS services. SIS Proposer has managed a minimum of three (3) public school districts in Massachusetts within the last five (5) years. The Proposer has mostly demonstrated that they have worked with and met school district expectations for feature enhancements to the SIS and satisfied the school, federal and state law needs and requirements within the Commonwealth of Massachusetts. Proposer has outlined a five (5) year strategic roadmap for the SIS, including priorities and product development including related product offerings which mostly align with the needs of Newton Public Schools. Proposer has shown that no more than two (2) Massachusetts districts have switched from the Proposer's SIS over the last five (5) years.

Not Advantageous: Proposer is unable to demonstrate favorable end-user experience in more than one of the following areas: updating, maintaining, installing, training, developing, managing and supporting SIS services. SIS Proposer is unable to demonstrate that they have managed a minimum of three (3) public school districts in Massachusetts within the last five (5) years. Proposer is unable to demonstrate that they have worked with and met school district expectations for feature enhancements to the SIS and satisfied the school, federal and state law needs and requirements within the Commonwealth of Massachusetts. Proposer's strategic roadmap for the SIS, including priorities and product development including related product offerings does not align with Newton's needs. Proposer has shown that three or more (3) Massachusetts districts have switched from the Proposer's SIS over the last five (5) years.

4. **Transition Plan** : (Rating weight = 20%)

The transition plan must include an achievable detailed identification of tasks, timelines, and resources required to ensure a seamless on-time transition and continuity of operations for Newton Public Schools as outlined in the Technical Proposal. The plan must detail additional resources the SIS Proposer will provide as well as the start-up tasks, implementation dates, estimated completion date and responsible party. At a minimum, major categories are to include as follows: (1) Hardware and Software (2) Installation support, (3) Data conversion, (4) SIS testing and data validation, (5) SIS Integration with other systems, (6) SIS required reporting, (7) SIS customization as required by NPS, (8) SIS training and (9) SIS launch and maintenance support, (10) backup and continuity configuration.

Highly Advantageous: SIS Proposer demonstrated an achievable and comprehensive plan addressing all ten (10) of the key transition plan requirements critical to NPS. (Hardware and Software Installation support, Data conversion, SIS testing and data validation, SIS Integration with other systems, SIS required reporting, SIS customization as required by NPS, SIS training and SIS launch and maintenance support, backup configuration).

Advantageous: SIS Proposer demonstrated an achievable and comprehensive plan addressing eight (8) out of ten (10) key transition plan requirements critical to NPS. (Hardware and Software Installation support, Data conversion, SIS testing and data validation, SIS Integration with other systems, SIS required reporting, SIS customization as required by NPS, SIS training and SIS launch and maintenance support, backup and continuity configuration).

Not Advantageous: SIS Proposer demonstrated a plan addressing fewer than eight (8) out of ten (10) key transition plan requirements critical to NPS (Hardware and Software Installation support, Data conversion, SIS testing and data validation, SIS Integration with other systems, SIS required reporting, SIS customization as required by NPS, SIS training and SIS launch and maintenance support, backup and continuity configuration).

5. **Data Migration:** (Rating weight = 15%)

The transition plan must include detailed data migration methodology and the expected roles of both the Proposer and the District as it pertains to data conversion. Proposer must specify if the proposer will convert the data from Skyward's Progress database or will require district staff to provide data through import templates, or a combination. Data Migration plan will outline a data conversion and data verification schedule and the data they will convert. Proposer will specify what, if any, additional charges exist for converting additional data sets as identified during or after the initial conversion. Data conversion plan must include: Demographics & Enrollment (student data, contact data, enrollment data), Attendance Data (summarized data for historical years, detailed class/daily data for current year data), Transcript & Historical grades data (school, course, teacher, credits, term and final grades), Current Grades data for PK-12 (note that elementary uses standards based grading), Current Schedule data (course, class, teacher, term, room as well as any additional data to run the schedule), Student Services Information (Current & Historical), Conversion & customization of the Report Card, Progress Report, Student Schedule Matrix and Transcript Templates.

Highly Advantageous: SIS Proposer demonstrates that they will convert the data from Skyward's Progress database without the use of extracts provided by district staff for all six (6) key transition plan requirements critical to NPS and that these key requirements have been met (Demographics & Enrollment, Attendance Data, Transcript & Historical grades data, Current Grades data for PK-12, Current Schedule data, Conversion & customization of the Report Card, Progress Report, Student Services, Student Schedule Matrix and Transcript Templates). SIS proposer has clearly outlined responsibilities of NPS staff for all data conversions and has clearly outlined data verification process. Proposer has demonstrated high quality in data conversions from previous SIS implementations.

Advantageous: SIS Proposer demonstrates that they will convert the data from Skyward's Progress database with some use of extracts provided by district staff for all six (6) key transition plan requirements critical to NPS and that these key requirements have been met (Demographics & Enrollment, Attendance Data, Transcript & Historical grades data, Current Grades data for PK-12, Current Schedule data, Conversion & customization of the Report Card, Progress Report, Student Services, Student Schedule Matrix and Transcript Templates). SIS proposer has clearly outlined responsibilities of NPS staff for all data conversions and has clearly outlined data verification process. Proposer has demonstrated somewhat quality in data conversions from previous SIS implementations.

Not Advantageous: SIS Proposer demonstrates that they will be able to convert data from Skyward's Progress database only with use of extracts provided by district staff for any or all six (6) key transition plan requirements critical to NPS (Demographics & Enrollment, Attendance Data, Transcript & Historical grades data, Current Grades data for PK-12, Current Schedule data, Conversion & customization of the Report Card, Progress Report, Student Services, Student Schedule Matrix and Transcript Templates). SIS proposer's responsibilities of NPS staff were not clearly outlined for all data conversions and data verification process. Proposer is unable to provide evidence of quality in data conversions from previous SIS implementations.

6. **Systems Integration** (Rating weight =5%)

SIS proposer must demonstrate ability to integrate with the systems outlined in the technical proposal. As part of the response Proposer will outline integration plan including attributes and timing of synchronization for each system within the response. Newton Public Schools currently integrates with the following systems: Active Directory/LDAP specific to Student & Staff account provisioning, Google Drive CPSI/SIF specific to Student & Staff account provisioning, PCG EasyIEP, Schoology, PSNI SNAP Health Center, Follet Destiny, SchoolMessenger, ELlevation Teachpoint, Food service/Lunch Box. Needs to specify if integration with other systems can be done bi-directionally with the SIS or if a 3rd party tool is needed. Specify if 3rd party tools are at an extra cost.

Highly Advantageous:

SIS proposer has demonstrated ability to integrate with the following systems at minimum on a nightly basis or synchronously through an API or other means: Active Directory/LDAP and Google Drive CPSI/SIF for Student & Staff account provisioning, Schoology for class rosters, term, final grades and assignment grades, SchoolMessenger for student and contact information. SIS should show the capability that it can create and schedule customized and flexible extracts for data required by Destiny, EasyIEP, ELlevation, etc. SIS proposer has outlined in the technical proposal the support for integration of the systems above during transition. Proposer has shown a proven track record of integration with the systems above.

Advantageous:

SIS proposer has demonstrated ability to integrate with the some but not all of the following systems at minimum on a nightly basis or synchronously through an API or other means: Active Directory/LDAP and Google Drive CPSI/SIF for Student & Staff account provisioning, Schoology for class rosters, term, final grades and assignment grades, SchoolMessenger for student and contact information. SIS should show the capability that it can create and schedule customized and flexible extracts for data required by Destiny, EasyIEP, ELlevation, etc. SIS proposer has somewhat outlined in the technical proposal the support for integration of the systems above during transition. Proposer has mostly shown a proven track record of integration with the systems above.

Not Advantageous:

SIS proposer was not able to demonstrate ability to integrate with the many of the following systems: Active Directory/LDAP and Google Drive CPSI/SIF for Student & Staff account provisioning, Schoology for class rosters, term, final grades and assignment grades, SchoolMessenger for student and contact information. SIS has not demonstrated the capability to create and schedule customized and flexible extracts for data required by Destiny, EasyIEP, ELlevation, etc. SIS proposer did not outline in the technical proposal the support for integration of the systems above during transition. Proposer has not shown a proven track record of integration with the systems above.

7. **User Training/Learning Methodology (Rating weight = 10%)**

Proposer will provide a detailed roadmap of training methodology including, but not limited to, all of the following: on-site training, web training, training materials, and any additional training that may be purchased. Proposer will provide training for the following roles: Principals and Administrators, Teachers (Train the Trainer model), Counselors, Schedulers, Administrative Assistants, and IT. Training should be tailored for these user groups and appropriate school levels (Elementary, Middle, High) in terms of training class size and content to be delivered. Proposer will provide training for all, but not limited to, the following SIS features: navigation, demographics, attendance, enrollment, family/student portal, grading/historical records, master schedule, walk-in scheduler, course setup, staff tracking, behavior management, special program enrollment (i.e. RTI, Athletics, Assessment Tracking and Transportation), custom reporting, advanced searching, and exporting. Proposer will specify if follow-up training opportunities are available for the above roles using built-in learning modules, webinar sessions and other training methodologies.

Highly Advantageous: SIS Proposer has outlined a comprehensive training plan. Training for the following six (6) roles will be completed on-site: Principals and Administrators, Teachers (Train the Trainer model), Counselors, Schedulers, Administrative Assistants, and IT. Training has been tailored for these user groups and appropriate school levels (Elementary, Middle, High) in terms of training class size and content to be delivered. Proposer has provided sample training materials which are clear and concise. Proposer has demonstrated the ability to differentiate training instruction to reach all learners from basic to advanced (i.e., technical and non-technical). Proposer has shown a proven track record for training districts of similar size and need as Newton Public Schools, during and after the SIS transition.

Advantageous: SIS Proposer has somewhat outlined a comprehensive training plan. Training for five (5) of the six (6) roles but not all of the following roles will be completed on-site: Principals and Administrators, Teachers (Train the Trainer model), Counselors, Schedulers, Administrative Assistants, and IT. Training is somewhat tailored for these user groups and appropriate school levels (Elementary, Middle, High) in terms of training class size and content to be delivered. Proposer has provided sample training materials which are clear and concise. Proposer has somewhat demonstrated the ability to differentiate training instruction to reach all learners from basic to advanced (i.e., technical and non-technical). Proposer has shown a proven track record for delivering training to districts of similar size and need as Newton Public Schools during and after the SIS transition.

Not Advantageous: SIS Proposer was not able to show a comprehensive training plan. Training for four (4) or less roles will be completed on-site: Principals and Administrators, Teachers (Train the Trainer model), Counselors, Schedulers, Administrative Assistants, and IT. Training is not tailored for user groups and appropriate school levels (Elementary, Middle, High) in terms of training class size and content to be delivered. Proposer has provided sample training materials which are clear and concise. Proposer has demonstrated the ability to differentiate training instruction to reach all learners from basic to advanced (i.e., technical and non-technical). Proposer has not demonstrated a proven track record for delivering training to districts of similar size and need as Newton Public Schools during and after the SIS transition.

8. **Post Transition Product Support (Rating weight = 5%)**

Proposer will provide information as to post-implementation product support including, but not limited to, all of the following: phone support, web support, qualified support staff and reasonable response time, SIS updates and upgrades support.

Highly Advantageous: Proposer has shown a proven track record in experience and capacity to fully meet the needs for ongoing SIS user support. Support response time is within 3 hours for non-critical issues, and is within 30 minutes for critical issues, during normal business hours. Proposer provides a searchable knowledge base of FAQs, and a discussion forum. Proposer has outlined an update schedule for the SIS software and has demonstrated additional support for updates at no additional cost, including support for customizations created for and by the district.

Advantageous: Proposer has shown a proven track record in experience and capacity to meet the needs for ongoing SIS user support. Support response time is within 5 hours for non-critical issues, and is within 1 hour for critical issues, during normal business hours. Proposer provides a searchable knowledge base of FAQs, or a discussion forum. Proposer has outlined an update schedule for the SIS software and demonstrated additional support for the updates at no additional cost including support for customizations created for and by the district.

Not Advantageous: Proposer is unable to show a proven track record in experience and capacity to meet the needs for ongoing user support of the SIS. Support response time is more than 5 hours for non-critical issues, and is more than 1 hour for critical issues, during normal business hours. Proposer does not provide a searchable knowledge base of FAQs, or a discussion forum. Proposer has not outlined an update schedule for the SIS software and did not demonstrate additional support for the updates including support for customizations created for and by the district.

9. **State Reporting Compliance (Rating weight = 10%)**

The SIS Proposer will demonstrate capability and compliance with current and future Massachusetts state reporting requirements, including, but not limited to, SIMS, SCS, and EPIMS using SIF standards. SIS Proposer must demonstrate a proven track record of maintaining compliance with state/federal reporting requirements.

Highly Advantageous: Proposer is fully compliant with MA state reporting requirements SIMS, SCS, EPIMS using SIF standards, with at least five (5) MA client districts submitting their SIMS, SCS, and EPIMS reports accurately and on time. Proposer demonstrates strong capability of supporting employee data within SIS for EPIMS state report. Proposer allocates additional resources to support the district in state reporting. Proposer has defined a process to be used to remain compliant with all future state reporting modifications and vendor updates to be maintained in a timely fashion without additional cost to District. Proposer guarantees that the SIS will maintain compliance with all State and Federal regulations and reporting requirements.

Advantageous: Proposer is compliant with MA state reporting requirements SIMS, SCS, EPIMS using SIF standards, with at least three (3) MA client districts submitting their SIMS, SCS reports accurately and on time and at least two (2) MA client districts submitting their EPIMS reports accurately and on time. Proposer demonstrates capability of supporting most employee data within SIS for EPIMS state report. Proposer allocates additional resources to support the district in state reporting. Proposer has defined a process to be used to remain compliant with all future state reporting modifications and vendor updates to be maintained in a timely fashion without additional cost to District. Proposer guarantees that the SIS will maintain compliance with all State and Federal regulations and reporting requirements.

Not Advantageous: Proposer is unable to show full compliance with MA state reporting requirements SIMS, SCS, using SIF standards, with MA client districts and or submitting their reports accurately and on time. Proposer is unable to show additional resources necessary to support the district in state reporting. Proposer has no defined process in place for remaining compliant with all future state reporting modifications and vendor updates. Proposer has not shown a guarantee that the SIS will maintain compliance with all State and Federal regulations and reporting requirements.

On completion of their rankings for Evaluation Criteria 1-9, Evaluators shall submit their ranking to the NPS Purchasing Manager who shall determine which responsive Proposers have composite rankings of Advantageous or better within the Newton SIS Requirements (Attachment E). All such Proposers will be scheduled for an interview.

VII. AWARD OF CONTRACT

The *Chief Procurement Officer* shall determine the most advantageous proposal from a responsible and responsive SIS Proposer taking into consideration price and the evaluation criteria set forth in the RFP.

In accordance with the provisions of G.L. c. 30B, sec. 9, The City of Newton reserves the right to waive any informalities in any or all proposals, or to reject any or all proposals, in whole or in part, if it be in the public interest to do so.

VIII. TERMS OF CONTRACT

It is anticipated that this three (3) year contract shall be effective upon its execution **through June 30, 2020**. The continuation of this contract for each fiscal year shall be subject to appropriation and/or continuation of funding for any fiscal year or any part thereof during the term of this Agreement. If funds for the discharge of the City's obligations under this Agreement are not appropriated and authorized, or funds so appropriated and authorized are reduced or withdrawn, then this Agreement shall terminate.

CITY OF NEWTON

PROPOSER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining Proposer responsiveness and responsibility with regard to the requirements and specifications of the Contract.

1. FIRM NAME: _____
2. WHEN ORGANIZED: _____
3. INCORPORATED? ____ YES ____ NO DATE AND STATE OF INCORPORATION: _____
4. IS YOUR BUSINESS A **MBE**? ____ YES ____ NO **WBE**? ____ YES ____ NO or **MWBE**? ____ YES ____ NO
- * 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:

- * 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?
____ YES ____ NO
IF YES, WHERE AND WHY?

- * 7. HAVE YOU EVER DEFAULTED ON A CONTRACT? ____ YES ____ NO
IF YES, PROVIDE DETAILS.

- * 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:

- * 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.

PROJECT NAME: _____
OWNER: _____
CITY/STATE: _____

DOLLAR AMOUNT: \$ _____ DATE COMPLETED: _____

PUBLICLY BID? _____ YES _____ NO
TYPE OF WORK?: _____
CONTACT PERSON: _____ TELEPHONE #: _____
CONTACT PERSON'S RELATION TO PROJECT?: _____
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: _____
OWNER: _____
CITY/STATE: _____
DOLLAR AMOUNT: \$ _____ DATE COMPLETED: _____
PUBLICLY BID? _____ YES _____ NO
TYPE OF WORK?: _____
CONTACT PERSON: _____ TELEPHONE #: (____) _____
CONTACT PERSON'S RELATION TO PROJECT?: _____
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: _____
OWNER: _____
CITY/STATE: _____
DOLLAR AMOUNT: \$ _____ DATE COMPLETED: _____
PUBLICLY BID? _____ YES _____ NO
TYPE OF WORK?: _____
CONTACT PERSON: _____ TELEPHONE #: (____) _____
CONTACT PERSON'S RELATION TO PROJECT?: _____
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: _____
OWNER: _____
CITY/STATE: _____
DOLLAR AMOUNT: \$ _____ DATE COMPLETED: _____
PUBLICLY BID? _____ YES _____ NO
TYPE OF WORK?: _____
CONTACT PERSON: _____ TELEPHONE #: (____) _____
CONTACT PERSON'S RELATION TO PROJECT?: _____
(i.e., contract manager, purchasing agent, etc.)

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Proposer's qualifications and experience.

DATE: _____ PROPOSER: _____

SIGNATURE: _____

PRINTED NAME: _____ TITLE: _____

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee club, or other organization, entity, or group or individuals.

(Signature of individual)

Name of Business

Telephone
(617) 796-1220
Fax:
(617) 796-1227
TDD/TTY
(617) 796-1089

**Request for Taxpayer
Identification Number and Certification**

**Give form to the
requester. Do not
send to the IRS.**

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership
☐ Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ☐ Other (see instructions) ▶

X Exempt
payee

Address (number, street, and a

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number

or

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

**Sign
Here**

Signature of
U.S. person ▶

Date ▶ Name

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

CONTRACT FORMS

The awarded Proposer will be required to complete and submit documents substantially similar in form to the following.

These forms may need to be modified on account of changed circumstances, and are provided for informational purposes only.

City - Contractor Agreement #C -
For
Student information System for Newton Public Schools

This Agreement is entered into by and between

(hereinafter the "Contractor") and the City of Newton, a municipal corporation acting by and through its School IT Department but without personal liability to him (hereinafter the "City"); collectively, the "parties."

WHEREAS, Newton Public Schools need the procurement of a Student Information System and

WHEREAS, the Contractor has submitted a responsive proposal for such services;

NOW THEREFORE, the parties agree as follows:

1. Incorporation of Attached Documents

The following documents, copies of which are attached hereto, are hereby incorporated as part of this Agreement:

-- City of Newton's Request for Proposal No. #17-95, dated _____ (RFP) issued by, *Chief Procurement Officer* (hereinafter "Request for Proposals");

--Technical and Price Proposal of _____, each dated _____, 2017 and signed by _____, (hereinafter, "Contractor's Proposal"); and

--any other Contract Documents, as defined in the RFP.

2. Scope of Work

Deliver, implement, manage and support a Student Information System (SIS)

3. Term of Agreement

Work under this RFP is expected to begin the day of contract execution and shall extend through June 30, 2020..

4. Payment procedures

The Contractor shall be paid on completion of identified project milestones to the satisfaction of the Director of the IT Department, after the submission of an invoice. Payment schedule will be as follows:

1 st year of start-up costs:	20% upon execution of contract and presentation of management plan - July 2017
	20% upon installation of software
	20% upon successful test of data conversion
	20% upon 30 days following successful Go-Live date
	20% upon submission and acceptance of required state and federal reposting –March 2018
Annual subscription	100% as of start of each school fiscal year with first year pro-rated in January 2018

5. Indemnification

The Contractor acknowledges and agrees that he is responsible as an INDEPENDENT CONTRACTOR for all services provided under this Agreement and for all the acts of her employees and agents hereunder and agrees that she will indemnify and hold harmless the City and its agents and employees from and against all claims, damages, losses and expenses, including attorney's fees arising out of, or resulting from, the performance of the services to be performed under this Agreement.

6. Insurance

The Contractor will provide the City with a certificate of insurance reflecting Comprehensive General Liability Insurance with a limit of liability of at least One Million Dollars (\$1,000,000.00) and evidence of workers compensation insurance covering employees of the Contractor. The Comprehensive General Liability policy must name the City as an additional insured and the certificate must reflect this status.

7. Governing Law

This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts.

8. Non-assignability

This Agreement and the duties of the Contractor to be performed hereunder or any payments due or accrued to the Contractor shall not be assigned or subcontracted.

9. Entire Agreement

This Agreement represents the entire understanding between the Contractor and the City. No change of any of the within terms and conditions can be made, except by written amendment(s) hereto and signed by both parties. This Agreement and any such amendments shall become binding on the City upon the execution thereof by the Mayor of Newton.

THIS SPACE INTENTIONALLY LEFT BLANK

IN WITNESS WHEREOF, the parties have set their hands and seals to this and two like originals.

CONTRACTOR

CITY OF NEWTON

By _____

Print Name _____

Title _____

Date _____

Affix Corporate Seal here

City funds in the amount of \$ Zero funds are needed in
FY17 available in account number:

I further certify that the Mayor, or his
designee, is authorized to execute contracts and
approve change orders

By _____

Comptroller of Accounts

Date _____

By _____

Chief Procurement Officer

Date _____

By _____

School Committee Chair

Date _____

Approved as to Legal Form and Character

By _____

Associate City Solicitor

Date _____

CONTRACT APPROVED

By _____

Mayor or his designee

Date _____

ATTACHMENT A – PRICE PROPOSAL

City of Newton NPS Purchasing Department

RFP #17-95 for Student Information System

Proposers shall use this “ATTACHMENT A” to this RFP #17-95 in submitting their price proposal(s). Please remember to submit your price proposal in a **separately sealed marked envelope**. Any Technical Proposal with prices may be deemed unresponsive.

This form must be completed and placed, within your price proposal and ensure your envelope is marked:

“RFP #17-95 Price Proposal –Student Information System”

Note that in order to be deemed responsive, Proposers must submit **both** a NPS locally Hosted Price and a Proposer Hosted Price.

Name of Firm or individual submitting proposal: _____
(Please Print)

Contact Person _____

Contact Signature: _____

Title: _____

Address: _____

Telephone / FAX#: _____ / _____

-

E-mail address: _____

The proposer acknowledges the following addenda: ____, ____, ____, ____

The price proposal set forth in this RFP shall constitute full and complete consideration to the City for the services to be provided by the SIS Proposer. There shall be no reimbursement for out-of-pocket or other expenses incurred by the SIS Proposer in connection with the performance of the services. Any exceptions may result in proposal rejection.

First year start-up costs (please fill in any costs that are applicable):

1. Set-up/Installation Fee for SIS software for NPS locally hosted use: \$ _____
2. Set-up/Installation Fee for SIS Proposer hosted use*: \$ _____
3. Consultant Hourly Rate \$ _____ X Est. # of hours _____ = \$ _____
4. Customization Hourly Rate \$ _____ X Est. # of hours _____ = \$ _____
5. Data Conversion (based on 13,100 student records) according to Technical Proposal, Section 15: = \$ _____
6. Data Conversion - Student Services (based on 2,500 student records) according to Technical Proposal, Section 15 cVII: = \$ _____

7. Training Hourly Rate \$ _____ X Est. # of hours _____
(according to Technical Proposal, Section 15) = \$ _____
8. Configuration/Implementation for Go-Live date of January 2018 = \$ _____
9. Administrative Fee (if applicable for travel, other costs) \$ _____

Three year subscription rate (SR) costs:*

10. Year 1 SR per NPS enrolled student (pro-rated for 6 months) \$ _____ X est. # 13,100= \$ _____
11. Year 1 SR per private enrolled student** (pro-rated for 6 months) \$ _____ X est. # 2,500 = \$ _____
12. Year 2 SR per NPS enrolled student for 12 months \$ _____ X est. # 13,100= \$ _____
13. Year 2 SR per private enrolled student** for 12 months \$ _____ X est. # 2,500= \$ _____
14. Year 3 SR per NPS enrolled student for 12 months \$ _____ X est. # 13,100= \$ _____
15. Year 3 SR per private enrolled student** for 12 months \$ _____ X est. # 13,100= \$ _____

**The numbers of students given are estimates, and the actual number may be greater or less than the estimate. Whatever the actual number of students, the bper student rates shall be those stated above.*

***Private enrolled students require limited registration only tracking basic demographic information.*

**GRAND TOTAL LOCALLY HOSTED PRICE for all start-up NPS locally hosted and three (3) years of subscription costs
(add lines 1 plus 3 through 14):** \$ _____

GRAND TOTAL PROPOSER HOSTED PRICE for all SIS Proposer hosted and three (3) years of subscription costs (add lines 2 through 14) \$ _____

Note that decision over alternate service(s) used, i.e., the GRAND TOTAL LOCALLY HOSTED PRICE or the PROPOSER HOSTED PRICE will be made by the City after submission and review of the Proposals.

ATTACHMENT – B

CERTIFICATE OF AUTHORITY - CORPORATE

1. I hereby certify that I am the Clerk/Secretary of _____
(insert full name of Corporation)
2. corporation, and that _____
(insert the name of officer who signed the **contract and bonds.**)
3. is the duly elected _____
(insert the title of the officer in line 2)
4. of said corporation, and that on _____
(insert a date that is ***ON ORBEFORE*** the date the officer signed the **contract and bonds.**)

at a duly authorized meeting of the Board of Directors of said corporation, at which all the directors were present or waived notice, it was voted that

5. _____ the _____
(insert **name** from line 2) (insert **title** from line 3)

of this corporation be and hereby is authorized to execute contracts and bonds in the name and on behalf of said corporation, and affix its Corporate Seal thereto, and such execution of any contract of obligation in this corporation's name and on its behalf, with or without the Corporate Seal, shall be valid and binding upon this corporation; and that the above vote has not been amended or rescinded and remains in full force and effect as of the date set forth below.

6. ATTEST: _____ *AFFIX CORPORATE
SEAL HERE*
(Signature of **Clerk or Secretary**)*
7. Name: _____
(Please print or type name in line 6)*
8. Date: _____
(insert a date that is ***ON ORAFTER*** the date the officer signed the **contract and bonds.**)

* The name and signature inserted in lines 6 & 7 **must** be that of the **Clerk or Secretary** of the corporation.

ATTACHMENT – C

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee club, or other organization, entity, or group or individuals.

(Signature of individual)

Name of Business

ATTACHMENT - D

CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.*

**Signature of Individual (Mandatory)

*** Contractor's Social Security Number
(Voluntary) or Federal Identification Number

Print Name: _____

Date: _____

OR

Company Name
(Corporation, Partnership, LLC, etc.)

By: _____
**Corporate Officer (Mandatory)

Print Name: _____

Date: _____

* The provision in this Certification relating to child support applies only when the Contractor is an individual.

** Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

*** Your social security number may be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended.

ATTACHMENT - E

CERTIFICATE OF FOREIGN CORPORATION

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

(Jurisdiction)

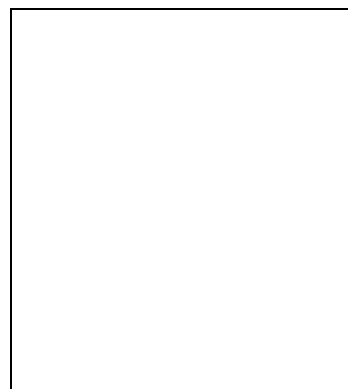
The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L (if applicable) and with the requirements of M.G.L. c. 156D, §15.03 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

Name of person signing proposal

Signature of person signing proposal

Name of Business (Please Print or Type)

Affix Corporate Seal here



ATTACHMENT - F

NEWTON PUBLIC SCHOOLS SIS REQUIREMENTS
(Attached as an Excel file)

ATTACHMENT - H

Newton Public Schools Map of School Locations

